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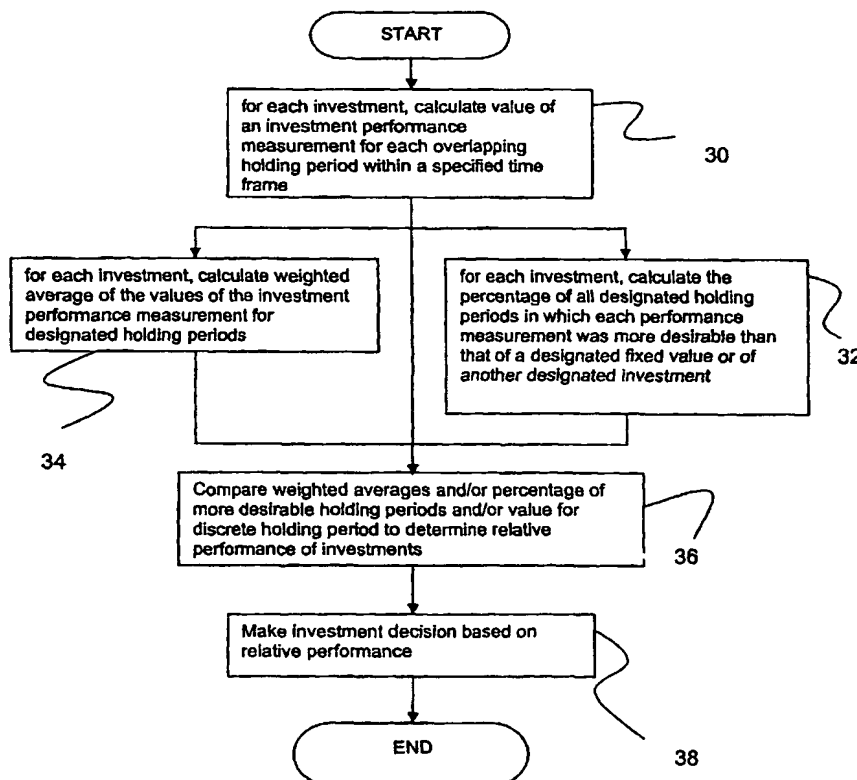
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[Continued on next page]

(54) Title: METHOD OF ANALYZING INVESTMENTS USING OVERLAPPING PERIODS



(57) Abstract: This invention consists of a process for the analysis and selection of financial investments based on a comparative analysis of performance and diversification. The method permits the manipulation of extremely large data sets in a manner that is simple to understand and convenient to use. This invention permits historical performance data for investments to be analyzed in respect of every possible investment period using any pre-existing or personally defined quantitative measurement algorithm. The user can apply his or her personal weightings to the various performance measurements based on a combination of attribute and time period to construct a customized scoring process, based on which a comparative ranking of the investments can be created. This invention also permits a complete universe of investments to be segmented into peer groups based on one of a number of similarity/dissimilarity criteria from which the user may choose.

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